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Building HW Network's commercial department from the Meta and Google playbook

> *"Il vous a souvent été dit qu'il n'envoyait pas un lourd fardeau sur des épaules faibles..."*
> **À Bruna Freitas.**
> *Caio, 02/07/2026*

The single most important insight from studying Meta and Google's account management organizations is this: revenue growth is not caused by relationship management — it is caused by specific, consultative interventions that change how accounts operate on the platform. Both companies have independently converged on the same model: score an account's gap from best practices, prescribe concrete actions to close that gap, and measure whether the account manager drove adoption. For HW Network, this means the Account Manager's job is not to "manage" affiliates but to diagnose their campaign architecture, prescribe specific optimizations (offer-creative combinations, bid strategies, traffic source expansion), and ensure implementation. Everything in this report — segmentation, lifecycle, signals, KPIs — is designed to make that atomic action happen at scale.

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1. Executive summary

The atomic action. At Meta and Google, the single repeatable action that causes revenue growth is *consultative product adoption* — identifying the gap between an account's current setup and platform best practices, then driving implementation of specific changes. At HW Network, the equivalent is the **Optimization Recommendation Cycle**: an AM analyzes an affiliate's campaign data, identifies the highest-leverage change (new offer, creative angle, campaign restructure, traffic source expansion), delivers a specific written recommendation, and follows through to implementation.

Account segmentation. Meta and Google both use composite scoring — not just current spend — to tier accounts by *future potential*. They deploy dedicated teams (1:5–15 ratio) for enterprise, scaled teams (1:50–200) for mid-market, and automated/self-serve for the long tail. HW Network should segment affiliates into four tiers based on current GMV, traffic capacity, creative sophistication, and multi-offer potential, then assign service intensity accordingly.

Lifecycle stages. Both platforms define discrete stages with measurable gates: activation (first campaign live), optimization (stable performance), expansion (multi-product adoption), and retention (sustained spending). HW Network should define five affiliate stages — Onboarding, First Profit, Consistent Performer, Growth Affiliate, and Elite Multi-Offer — each with objective criteria that trigger the next playbook.

Signal-based management. Google's Recommendations engine and Meta's Opportunity Score translate raw data into prescribed actions. HW Network needs a dashboard that surfaces **five daily signals** — spend trend, conversion rate shift, creative fatigue, offer-level comparison, and engagement status — and maps each to a specific AM action.

North Star Metric. The metric that aligns HW Network and affiliate incentives simultaneously is **Net GMV Growth per Managed Affiliate** — the average incremental GMV generated across all managed accounts, net of churn. This decomposes into team-level retention and expansion KPIs, individual AM activity metrics, and affiliate-facing performance indicators.

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2. The atomic action that causes revenue growth

How Meta drives advertiser spend through consultative adoption

Meta's account-facing role is the **Client Solutions Manager (CSM)**, positioned explicitly as "a trusted consultant in media planning, strategy, and measurement." The CSM is paired with a Client Partner (relationship owner) and operates as the analytical engine that translates data into advertiser action. Based on Meta's official job postings across its Global Business Group, CSMs perform six core activities: analyzing sales data to create targeted strategies, developing custom analyses with narrative recommendations, designing A/B experiments, educating clients on product solutions, driving media and measurement strategy, and identifying upsell opportunities through strategic account plans.

The vehicle for these consultative conversations is Meta's **Opportunity Score**, launched globally in June 2025. This 0–100 scoring system evaluates how well campaigns align with Meta's best practices and surfaces specific recommendations ranked by estimated impact. Recommendation categories include enabling Advantage+ placements, fixing audience fragmentation, adding creative formats (9×16 video for Reels), implementing Conversions API, and optimizing budget allocation. **Advertisers who adopted Opportunity Score recommendations saw a 12% median decrease in cost per result** in Meta's testing. The score creates a persistent, quantified "to-do list" that gives every CSM conversation a concrete starting point.

The product that CSMs most aggressively drive adoption of is the **Advantage+ suite**. By Q4 2024, Advantage+ Shopping campaigns had scaled past **$20 billion in annual run-rate revenue**, growing 70% year-over-year. Meta reports **22% higher ROAS** for U.S. advertisers using Advantage+ versus manual campaigns. However, independent measurement firm Haus found through 640 incrementality tests that Advantage+ only outperformed manual campaigns in 42% of tests — a critical nuance that reveals the consultative skill required to know *when* automation helps versus when manual optimization is superior.

How Google drives advertiser spend through optimization scoring

Google's equivalent is the **Optimization Score**, a more mature system (launched circa 2018–2019) that provides a 0–100% score estimating how well an account can perform. Calculated in real-time across Search, Display, Video, Performance Max, Demand Gen, and Shopping campaigns, it surfaces **over 50 recommendation types** organized into six categories: bidding and budget, keywords and targeting, ads and assets, automated campaigns, repairs, and measurement.

Google's central performance claim: **advertisers who increased their Optimization Score by 10 points saw a median 14% increase in conversions**. An independent study by Optmyzr analyzing 17,380 accounts found that accounts in the 90–100 Optimization Score range **beat sub-70 accounts on ROAS by 186%**. However, only 5.5% of accounts actually accepted Google's recommendations — meaning the AM's role in *driving adoption* is the bottleneck, not the recommendation itself.

Google Account Managers in its Customer Solutions (GCS) organization are explicitly measured on **"product adoption quarterly goals"** per official job postings. The Accelerated Growth Team (AGT), a specialized GCS sub-team, requires advertisers to make a non-binding spend commitment over 3–6 months in exchange for elevated service — directly tying the AM intervention to revenue growth.

The underlying principle

Both platforms have discovered the same truth: **the highest-leverage AM action is closing the gap between an account's current configuration and the platform's best-practice frontier.** The scoring frameworks (Opportunity Score, Optimization Score) serve three functions simultaneously: they diagnose the gap, prescribe the fix, and measure whether the AM drove implementation. The causal chain is: AM identifies gap → builds data-driven business case → advertiser implements change → platform AI optimizes with better inputs → performance improves → advertiser increases budget → AM identifies next gap.

HW Network adaptation: the Optimization Recommendation Cycle

For HW Network, the atomic action is the **Optimization Recommendation Cycle (ORC)** — a structured, repeatable process where an AM:

1. **Diagnoses** the affiliate's current performance across all active offers using a standardized scorecard (conversion rate vs. network average, EPC trends, creative freshness, traffic source diversification, offer-level ROI comparison)
2. **Identifies the single highest-leverage change** — this could be: recommending a specific new offer that matches the affiliate's audience profile, suggesting a creative angle based on top-performer benchmarks, restructuring campaign architecture (e.g., splitting a broad campaign into offer-specific ad sets), providing landing page or VSL performance data that shifts the affiliate's traffic allocation, or recommending expansion to a new traffic source
3. **Delivers a written, specific recommendation** with supporting data (e.g., "Offer X is converting at 4.2% for affiliates with similar traffic profiles to yours. Your current Offer Y is at 2.1%. Here is the top-performing creative angle and the LP that converts best for women 55+ on Facebook. Recommended action: launch a $500/day test on Offer X using Creative Template B within 48 hours.")
4. **Follows through** to verify implementation and measure results within 7 days
5. **Documents the outcome** to build the network's institutional knowledge base

Training AMs on the ORC. New AMs complete a 2-week certification: Week 1 covers offer portfolio knowledge (memorizing conversion benchmarks, audience profiles, and creative best practices for every active offer), and Week 2 is spent shadowing a senior AM through 10 live ORC cycles, then delivering 3 supervised ORCs independently. Certification requires passing a case-study exam where the AM must analyze a mock affiliate's data and produce a recommendation within 30 minutes.

Measuring execution quality. Each ORC is scored on four dimensions: (1) Was the recommendation specific and actionable? (2) Was it data-supported? (3) Did the affiliate implement it? (4) Did it produce measurable results within 14 days? The **ORC Implementation Rate** (% of recommendations adopted) and **ORC Hit Rate** (% of adopted recommendations that improved performance) become the AM's core quality metrics.

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3. Account segmentation and organizational structure

Meta's tiering system: GBG, mid-market, and self-serve

Meta's advertising sales organization operates through two channels. The **Global Business Group (GBG)**, led by Nicola Mendelsohn, manages relationships with Fortune 1000 advertisers, top agencies, and strategic accounts through dedicated Client Partner + Client Solutions Manager teams organized by industry vertical (Enterprise Technology, Retail, CPG, etc.). The **Online Sales, Operations and Partnerships** division, led by Justin Osofsky, focuses on growing small and medium businesses at scale.

Former Meta SVP Rick Kelley (15 years at Meta) described the headcount allocation methodology in detail: Meta uses a **weighted scoring model across 7–8 variables** — including user base in country, total ad revenue, online ad revenue, and Facebook user penetration — to create a priority-ranked hiring sequence. "If I was given 150 heads, I would know the order of which I would go and hire them," Kelley explained. Segments are structured from the start: "You guys are gonna only manage the top 200... manage all the SMBs in the mid-market. You need a named account list." When a segment reaches critical mass (gaming hit 15% of company revenue), it gets its own organizational structure.

The service model operates at three levels. **Enterprise/Managed** accounts get a 1:1 dedicated team (Client Partner for relationship + CSM for analytics and optimization). **Mid-Market/Scaled** accounts are served by Account Managers under an Account Lead, with each AM managing multiple accounts. The **Self-Serve** tier (the vast majority of Meta's 10M+ advertisers) receives no human account management, served entirely through Meta Ads Manager, Advantage+ automation, and Blueprint educational content.

Google's tiering: LCS, GCS, and the extended workforce

Google's split mirrors Meta's but with sharper organizational boundaries. **Large Customer Sales (LCS)** serves enterprise advertisers with dedicated account teams organized by industry vertical, supported by Campaign Managers based in India. **Google Customer Solutions (GCS)** serves mid-market and SMB advertisers through Account Strategists, Account Managers, and Account Executives. Within GCS, the **Accelerated Growth Team (AGT)** targets advertisers with "significant growth potential" who commit to a spend increase over 3–6 months. At the lowest tier, many accounts are served by an **extended workforce (XWF)** — contractors, not Google employees — or receive no human support at all.

Assignment between LCS and GCS is reviewed annually and based on "spend, yes, but also on growth potential and other factors," according to former Googler Jyll Saskin Gales (LCS, 2015–2021). This composite scoring approach — not a single spend threshold — determines which accounts receive premium service.

The underlying principle

Both companies segment on **future potential, not just current value**. The segmentation variables combine current spend level, spend trajectory, product adoption breadth, measurement maturity, engagement with account team, and industry/vertical TAM. The service model then scales human effort precisely to where it generates the highest return: intensive support for high-potential accounts, automated systems for the long tail.

HW Network segmentation model

HW Network should segment affiliates into four tiers based on a composite **Affiliate Potential Score (APS)** that weights six variables:

Variable	Weight	Measurement
Current monthly GMV	25%	Trailing 30-day GMV in USD
GMV growth trajectory	20%	3-month compound monthly growth rate
Traffic source capacity	20%	Monthly ad spend capacity across all platforms
Creative testing velocity	15%	Number of unique creatives tested per month
Multi-offer adoption	10%	Number of active offers generating >$1K/month
Technical sophistication	10%	Tracking setup quality, split-testing infrastructure, automation usage

Tier definitions and service models:

Tier	Name	APS Range	Monthly GMV	AM Ratio	Service Model
1	Elite	85–100	>$500K	1:5	Dedicated AM, weekly strategy calls, priority offer access, custom creative support
2	Growth	60–84	$100K–$500K	1:15	Named AM, bi-weekly calls, ORC cycles, performance benchmarking
3	Developing	30–59	$10K–$100K	1:50	Pooled AM team, monthly check-ins, templated recommendations, group trainings
4	Self-Serve	0–29	<$10K	Automated	Self-serve portal, automated offer

Tier	Name	APS Range	Monthly GMV	AM Ratio	Service Model
					recommendations, email campaigns, knowledge base

Recommended organizational structure

Head of Commercial (reports to CEO)

- Owns total network GMV target, department P&L, and commercial strategy
- Direct reports: 3 Team Leads + 1 Commercial Operations Manager

Team Lead — Elite Accounts (manages 3 AMs)

- Each AM manages ~5 Elite affiliates
- Team target: 60% of network GMV

Team Lead — Growth Accounts (manages 3 AMs)

- Each AM manages ~15 Growth affiliates
- Team target: 25% of network GMV

Team Lead — Developing & Scale (manages 2 AMs + 1 Automation Specialist)

- AMs manage ~50 Developing affiliates each via pooled model
- Automation Specialist manages self-serve systems, email sequences, and automated recommendations
- Team target: 15% of network GMV

Commercial Operations Manager (manages 1 Data Analyst + 1 CRM/Tools Specialist)

- Owns dashboards, reporting, CRM configuration, and data infrastructure
- Produces weekly performance packs and affiliate scorecards

Total headcount at launch: 16 people (1 Head + 3 Team Leads + 8 AMs + 1 Automation Specialist + 1 Ops Manager + 1 Data Analyst + 1 CRM Specialist). This scales to approximately **$25–37M GMV per commercial team member**, consistent with high-performing ad-tech sales organizations.

Headcount planning framework

Use Meta's approach: for each incremental hire, model the **expected GMV uplift per AM** based on historical data showing the impact of managed vs. unmanaged affiliates. The decision to add headcount is justified when: (a) the expected GMV uplift from the marginal AM exceeds 3× their fully loaded cost within 6 months, or (b) existing AM-to-account ratios exceed tier ceilings by >20%, indicating service quality degradation.

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4. Account lifecycle and stage-specific playbooks

Meta's advertiser lifecycle model

Meta's documented lifecycle operates at the campaign level through the **Learning Phase** system: new campaigns enter a learning phase requiring **50 optimization events within 7 days** (recently reduced to 10 events for Purchase-optimized campaigns) before delivery stabilizes. Campaigns that fail to accumulate sufficient data enter "Learning Limited" status — a clear, binary gate.

At the advertiser level, the lifecycle is inferred from platform mechanics and Meta's onboarding infrastructure: **Activation** (account creation → Business Manager setup → Pixel/CAPI installation → first payment → first campaign live), **Optimization** (learning phase exit → stable CPA/ROAS → measurement infrastructure fully configured), **Expansion** (budget scaling → multi-campaign types → Advantage+ adoption → cross-surface deployment), and **Retention** (consistent monthly spending → advanced feature adoption → value-based bidding). Meta's budget scaling guidance — increases of **less than 20% every 72 hours** to avoid resetting learning — reveals how carefully the platform manages the optimization-to-expansion transition.

Google's advertiser lifecycle model

Google's lifecycle is more explicitly productized through its **Customer Lifecycle Goals** feature, which segments end-customers into New, High-Value New, Returning, Lapsed, and High-Value Lapsed categories. For the advertiser's own journey on the platform, practitioner consensus identifies five phases: **Setup** (24–48 hour approval → product linking → conversion tracking), **Learning** (~7 days of algorithm calibration), **Initial Optimization** (days 14–30: negative keywords, bid adjustments, ad copy testing), **Maturation** (days 30–90: discontinue non-converting ad groups, device/location optimization), and **Scaling** (day 90+: budget increases on profitable campaigns, Performance Max adoption, cross-campaign optimization). Google offers free 1:1 expert onboarding within the first 30 days — a clear TTV acceleration mechanism.

Google's published academic research on churn prediction (Yoon, Koehler, Ghobarah, 2010, Google Research) proposed machine learning models using features like spend trajectory, campaign editing frequency, platform login patterns, and conversion rate trends. A detailed ML case study demonstrated that a gradient-boosted model using ~200 features could achieve a **24% churn rate reduction** in a pilot segment.

The underlying principle

Lifecycle management works because it **converts vague relationship management into specific, stage-appropriate interventions**. The key insight is that what an account needs at Day 7 (technical setup help) is entirely different from what it needs at Day 90 (strategic expansion guidance). Stage gates prevent AMs from applying the wrong playbook — you don't pitch budget expansion to an affiliate that hasn't achieved stable ROAS yet.

HW Network affiliate lifecycle: five stages with measurable gates

Stage	Name	Entry Gate	Exit Gate	Duration Target	Primary AM Action
1	**Onboarding**	Affiliate agreement signed	First approved campaign live with tracking confirmed	≤7 days	Technical setup: tracking links, offer selection guidance, creative asset delivery, compliance review

Stage	Name	Entry Gate	Exit Gate	Duration Target	Primary AM Action
2	**First Profit**	First campaign live	7 consecutive days of profitable traffic (positive ROI after offer payout)	≤30 days from Stage 1 entry	Campaign optimization: help affiliate find winning creative/offer/audience combination, daily data review
3	**Consistent Performer**	7 days profitable	3 consecutive months of >$10K GMV with positive ROI	≤90 days from Stage 2 entry	Scaling support: budget increase guidance, A/B testing framework, additional offer recommendations
4	**Growth Affiliate**	3 months >$10K GMV	Running 3+ offers simultaneously with >$50K total monthly GMV	Variable	Portfolio diversification: multi-offer strategy, traffic source expansion, custom creative development
5	**Elite Multi-Offer**	3+ offers, >$50K/month	Sustained >$100K monthly GMV across 5+ offers for 6+ months	Ongoing	Strategic partnership: priority offer access, co-development of exclusive angles, market intelligence sharing

Stage-specific playbook actions

Stage 1 — Onboarding (Day 1–7):

- Day 1: Welcome call (30 min). Confirm affiliate's traffic sources, daily budget capacity, and vertical experience. Assign 2–3 starter offers based on their audience profile.
- Day 2–3: Deliver tracking links, approved creative templates, and compliance guidelines. Verify tracking pixel fires correctly with test conversions.
- Day 4–5: Review affiliate's campaign setup before launch. Check targeting parameters, bid strategy, and creative compliance.
- Day 6–7: Confirm first campaign is live and delivering. Verify conversion data flows into HW Network's system. If not live by Day 7, escalate to Team Lead.

Stage 2 — First Profit (Day 7–37):

- Daily: Monitor affiliate's spend and conversion data. Flag if CPA exceeds offer payout by >30%.
- Day 10: First ORC — analyze initial data, recommend creative/targeting adjustments.
- Day 14: If no profitable day yet, recommend offer switch or audience pivot with specific data.
- Day 21: If still unprofitable, escalate to senior AM for portfolio review and potential offer reallocation.

- Day 30: If no profit achieved, move to "At Risk — Activation Failure" protocol.

Stage 3 — Consistent Performer (Month 1–3):

- Weekly: Send performance benchmark comparison (affiliate vs. network average for same offers).
- Bi-weekly: Deliver ORC focused on scaling (budget increase recommendation with specific increment, or new creative angle based on network top-performer data).
- Monthly: Introduce one new offer with data-driven rationale for testing.
- End of Month 3: Conduct Stage Review — if gates met, upgrade to Growth tier with increased service level.

Stage 4 — Growth Affiliate (Month 3+):

- Bi-weekly: Strategy call focused on portfolio optimization across all offers.
- Monthly: Deliver competitive intelligence briefing (what's working across the network, emerging offers, creative trends).
- Quarterly: Formal Business Review with performance analysis, goal-setting, and expansion planning.
- Ongoing: Priority access to new offer launches, beta tests, and exclusive angles.

Stage 5 — Elite Multi-Offer (Month 9+):

- Weekly: Direct strategic dialogue with Team Lead or Head of Commercial.
- Monthly: Custom market intelligence report.
- Quarterly: In-depth strategic planning session including offer pipeline preview, exclusive testing opportunities, and co-development of custom landing pages/VSLs.
- Ongoing: Dedicated Slack channel, priority support SLA (<2 hour response), input into offer sourcing decisions.

Churn risk indicators and intervention protocols

Drawing from Google's churn prediction research and B2B customer success best practices, HW Network should monitor these leading indicators:

- **Spend decline**: >20% week-over-week drop in ad spend for 2 consecutive weeks → Trigger: AM outreach within 24 hours with performance diagnosis
- **Conversion rate collapse**: >30% decline in conversion rate over 7 days → Trigger: immediate creative/offer review with specific recommendations
- **Activity cessation**: No new campaigns or creative tests in 14+ days → Trigger: proactive "re-engagement" call with new offer recommendations
- **Communication disengagement**: 2+ missed scheduled calls or unresponded messages for 5+ business days → Trigger: Team Lead outreach via alternative channel

- **Multi-offer contraction**: Dropping from 3+ active offers to 1 → Trigger: portfolio review call, new offer incentive (e.g., enhanced payout for 30-day test)

Intervention protocol: When 2+ risk indicators fire simultaneously, the affiliate enters **Red Status** — a 14-day intensive intervention period where the AM conducts daily check-ins, delivers 3 ORCs within the first week, and escalates to the Team Lead if no improvement by Day 7.

Time-to-Value benchmarks

HW Network's **primary TTV metric** is **Time to First Profitable Day (TTFPD)** — the number of calendar days from affiliate agreement signing to the first day where the affiliate's traffic generates positive ROI after offer payouts. Target: **≤14 days** for Tier 1–2 affiliates, **≤21 days** for Tier 3, **≤30 days** for Tier 4. Track this metric weekly and hold AMs accountable for their cohort's TTFPD performance.

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5. Signal-based management system

Meta's approach to surfacing actionable signals

Meta's customer-facing signal system centers on the **Opportunity Score**, which provides real-time, prioritized recommendations across six categories: audience/targeting optimization, creative improvements, budget/bidding adjustments, campaign structure simplification, Advantage+ automation adoption, and error/warning resolution. The score updates as recommendations are applied, creating a continuous feedback loop. Internally, Meta's CSMs are trained to translate these platform-level signals into advertiser-specific business narratives — the job description explicitly requires "developing narratives and recommendations from custom analyses."

Meta's signal infrastructure relies on the **Facebook Pixel + Conversions API (CAPI)** combination for data collection, **Event Match Quality scores** for signal integrity measurement, and the **Performance 5 framework** (account simplification, Advantage+ automation, creative diversification, broad targeting, results measurement) as the interpretive lens for all signals.

Google's recommendation engine as a decision-making system

Google's system is more mature and granular, with **over 50 recommendation types** available through the Optimization Score, each showing a specific "score uplift" estimate. The system is available at Campaign, Account, and Manager Account (MCC) levels, enabling both account-level and portfolio-level signal monitoring. Key features include **auto-apply** (allowing specific recommendation types to be implemented automatically), the **Explanations feature** (diagnosing performance fluctuations with period-over-period comparison), and the **RecommendationService API** for programmatic access.

Google's MCC dashboard provides portfolio-level visibility: cross-account performance comparison, centralized recommendation viewing, budget and billing monitoring, and automated rules for systematic management. This architecture enables a single AM to monitor dozens of accounts by exception — only intervening when signals exceed thresholds.

The underlying principle

Signal-based management replaces the question *"What should I do with this account today?"* with the answer *"Here is exactly what to do, ranked by impact."* The system works because it converts raw data into **prescribed actions** — not just metrics, but decisions. The AM's skill shifts from data analysis to judgment about *which* prescribed action to prioritize and *how* to present it to the account.

HW Network dashboard specifications

The AM Daily View must display five core signals for each managed affiliate, refreshed every 4 hours:

Signal	Definition	Threshold for Alert	AM Action When Triggered
Spend Trend	7-day rolling average daily spend vs. prior 7-day period	>15% decline	Contact affiliate within 24h; diagnose cause (budget cap, platform issue, or intentional pause)
Conversion Rate Shift	Trailing 3-day CR vs. trailing 30-day CR for each active offer	>20% decline	Deliver creative fatigue analysis + 2 specific creative recommendations
Creative Freshness Index	Days since affiliate's top-performing creative was first launched	>21 days without new creative test	Send top-performing creative templates from network benchmarks
Offer Performance Comparison	Affiliate's EPC for each offer vs. network median EPC for that offer	Affiliate EPC <70% of network median	Recommend offer switch with data showing expected uplift
Engagement Status	Days since last AM-affiliate interaction (call, message, email)	>7 days for Tier 1–2; >14 days for Tier 3	Schedule proactive outreach with specific value-add

Portfolio View (for Team Leads) should aggregate these signals across all AMs' books, highlighting: total managed GMV trend, number of affiliates in Red/Yellow/Green status, ORC completion rate, and stage progression metrics.

Ritual cadences

Daily (15 min — individual AM):

- Review dashboard alerts for all managed accounts
- Prioritize: Red alerts first, then Yellow, then proactive expansion plays
- Update CRM notes for any actions taken
- Agenda: "Which account needs me most today, and what is the single action I will take?"

Weekly (45 min — team standup, led by Team Lead):

- Each AM presents: (1) top win of the week (successful ORC with data), (2) biggest risk account and intervention plan, (3) one ORC planned for the coming week
- Team Lead shares: network-wide performance trends, new offers launching, creative insights
- Review: stage progression (how many affiliates moved between stages this week?)

Monthly (90 min — commercial department review, led by Head of Commercial):

- Review: total network GMV vs. target, by tier and by team

- Deep dive: Top 10 and Bottom 10 affiliates — what's working and what isn't
- Churn analysis: affiliates lost, root causes, preventability assessment
- New affiliate pipeline review
- ORC quality audit: sample 5 ORCs, score them, discuss improvement
- Agenda output: 3 specific actions for the next month

Quarterly (half-day — strategic planning, Head of Commercial + Team Leads + CEO):

- Review: quarterly GMV vs. target, YoY trends, unit economics
- Segmentation review: rebalance tier assignments based on updated APS scores
- Headcount assessment: AM utilization rates, GMV-per-AM analysis, hiring needs
- Offer portfolio review: retire underperformers, plan new offer acquisitions
- OKR setting for next quarter
- Compensation review: quota attainment distribution, incentive structure effectiveness

Decision trees for affiliate network context

Creative fatigue detected (CTR declining >15% over 7 days on affiliate's top creative):
→ Pull network benchmark data for same offer
→ Identify top 3 creative angles currently performing across the network
→ Package as ORC: "Your main creative is showing fatigue. Here are 3 angles that are converting at [X]% for similar traffic. Recommended: test Angle B with your existing audience at $200/day for 5 days."

New offer launch (HW Network adds a new health supplement offer):
→ Score all managed affiliates on fit: does their audience match? Do they have capacity?
→ For top-fit affiliates: proactive outreach with offer data sheet, sample creative, and expected EPC range
→ For Growth/Elite affiliates: personalized recommendation with comparison to their current offer portfolio

Affiliate's top offer gets paused or payout reduced:
→ Immediate outreach (within 2 hours for Tier 1, within 24 hours for Tier 2–3)
→ Provide 2–3 alternative offer recommendations with comparative data
→ If the affiliate has >50% of GMV on the affected offer, escalate to Team Lead for retention intervention

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6. North Star Metric and KPI architecture

Meta's sales organization metrics

Meta's company-wide North Star Metric is **Daily Active Users / Monthly Active Users**, but its sales organization operates against revenue-focused metrics. Client Partners are measured on **revenue growth** with a compensation structure of 55% base / 45% variable, where variable pay is tied to account growth, retention, renewals, and upsell/cross-sell revenue. Tiered commissions escalate after 100% quota attainment. Approximately **65% of Meta AMs meet or exceed quota**, suggesting quotas are set at stretch-but-achievable levels. Top performers earn **$570K–$580K** total compensation against a median OTE of ~$200K, indicating significant accelerators for overperformance.

Meta's CSM role description explicitly balances "driving revenue" with "client KPIs" — indicating the internal metric framework tracks both Meta revenue and advertiser outcomes. This dual-focus prevents short-term revenue extraction at the expense of long-term retention.

Google's sales organization metrics

Google's sales organization uses the **See-Think-Do-Care** framework for advertiser KPI setting and measures internal AM performance against quota attainment plus product adoption quarterly goals. Google's OKR system, documented extensively in its re:Work publication, operates on a 0–1.0 grading scale where **0.6–0.7 represents success** (the "sweet spot") and 1.0 means the objective wasn't ambitious enough. Crucially, **OKRs are explicitly not tied to compensation** at Google — they are a planning and alignment tool, not a performance evaluation mechanism. This separation prevents sandbagging and encourages ambitious goal-setting.

The Alexander Group's media ad sales framework, used as an industry benchmark, defines four sales motions: **Land** (new customer acquisition), **Expand** (grow existing accounts), **Renew** (retain current revenue), and **Optimize** (improve campaign performance). Account Executives skew toward Land and Expand; Account Managers skew toward Renew and Optimize. Both Meta and Google reflect this division — Client Partners/Account Executives own revenue growth targets while CSMs/Account Strategists own optimization and adoption metrics.

The underlying principle

The most effective sales organizations align their North Star Metric such that **maximizing the metric simultaneously benefits the company and the customer**. If the NSM is pure revenue, AMs push spend at the expense of advertiser ROI. If the NSM is pure advertiser satisfaction, the company undermonetizes. The solution is a **joint value metric** that captures the intersection: the advertiser succeeding *and* spending more because they're succeeding.

HW Network North Star Metric: Net GMV Growth per Managed Affiliate

Definition: The average incremental monthly GMV generated per managed affiliate, net of churned GMV from lost affiliates.

Formula: (Total Managed GMV in Month N − Total Managed GMV in Month N-1 + GMV lost from churned affiliates) ÷ Number of Managed Affiliates at end of Month N

Why this works: It aligns HW Network and affiliate interests because GMV only grows sustainably when affiliates are profitable. An affiliate who isn't profitable stops spending, which reduces GMV. Therefore, maximizing Net GMV Growth per Managed Affiliate *requires* ensuring affiliates succeed. It also penalizes churn (the "net" component) and rewards both activation of new affiliates and expansion of existing ones.

Full KPI decomposition tree

Level 0 — Department NSM (owned by Head of Commercial):

- Net GMV Growth per Managed Affiliate
- Target: Set quarterly based on trailing 6-month baseline + growth ambition
- Measured: Monthly, reported to CEO

Level 1 — Team KPIs (owned by Team Leads):

KPI	Definition	Formula	Frequency	Target Methodology
Team GMV	Total GMV generated by team's managed affiliates	Sum of all affiliate GMV in book	Weekly	Bottom-up: sum of individual affiliate forecasts
Net Revenue Retention	% of prior period GMV retained + expanded	(Current period GMV from affiliates active in prior period) ÷ (Prior period GMV)	Monthly	≥110% (indicates net expansion)
Affiliate Activation Rate	% of new affiliates reaching Stage 2 within 30 days	(New affiliates reaching First Profit) ÷ (New affiliates onboarded)	Monthly	≥70%
Stage Progression Rate	% of affiliates advancing one stage per quarter	(Affiliates who advanced a stage) ÷ (Total managed affiliates eligible)	Quarterly	≥25%

Level 2 — Individual AM KPIs (owned by each Account Manager):

KPI	Definition	Formula	Frequency	Target Methodology
Book GMV vs. Quota	Total GMV from managed affiliates vs. target	Actual GMV ÷ Quota	Monthly	Top-down: department target allocated by tier weights
ORC Delivery Rate	ORCs delivered per affiliate per month	Total ORCs ÷ Active affiliates in book	Monthly	Tier 1: ≥4/mo, Tier 2: ≥2/mo, Tier 3: ≥1/mo
ORC Implementation Rate	% of delivered ORCs that affiliates implement	Implemented ORCs ÷ Delivered ORCs	Monthly	≥60%
ORC Hit Rate	% of implemented ORCs that improved performance	Successful ORCs ÷ Implemented ORCs	Monthly	≥50%
Time to First Profitable Day	Calendar days from onboarding to first profitable day	Date of first profit – Date of onboarding	Per cohort	≤14 days (Tier 1–2), ≤21 days (Tier 3)
Affiliate Churn Rate	% of book GMV lost to churned affiliates	Churned GMV ÷ Beginning-of-period book GMV	Monthly	<5% monthly

Level 3 — Activity Metrics (tracked, not targeted):

- Number of affiliate calls/meetings per week
- Average response time to affiliate inquiries
- Number of creative assets shared per month
- Number of new offers introduced to affiliates per month
- CRM note completeness (% of interactions documented)

Compensation and incentive alignment

Adapting Meta's 55/45 base/variable structure and tiered commission model:

AM Compensation Structure:

- Base salary: 60% of OTE (slightly higher base than Meta to account for smaller company risk)
- Variable: 40% of OTE, paid monthly based on:
  - 70% weight: Book GMV vs. quota (primary revenue metric)
  - 20% weight: ORC Implementation Rate (quality of consultative work)
  - 10% weight: Affiliate stage progression (long-term value creation)
- **Accelerator**: 1.5× commission rate above 100% quota, 2× above 120%
- **Floor**: Minimum 80% of base guaranteed regardless of variable performance
- **Team bonus**: Quarterly pool (5% of team's incremental GMV above target) split equally if team hits collective target — encouraging collaboration over account hoarding

Team Lead Compensation:

- Base: 65% of OTE
- Variable: 35%, weighted: 50% team GMV quota, 25% team NRR, 25% affiliate activation rate
- Accelerators mirror AM structure

Head of Commercial Compensation:

- Base: 70% of OTE
- Variable: 30%, weighted: 60% department GMV target, 20% department NRR, 20% headcount efficiency (GMV per commercial team member)

OKR template for one quarter

Department Objective: Accelerate affiliate growth engine to $X monthly GMV

KR1: Achieve $[X]M total managed GMV (currently $[Y]M), representing [Z]% growth
KR2: Activate [N] new affiliates to Stage 2 (First Profit) within 30 days of onboarding
KR3: Grow Net Revenue Retention to ≥115% across all managed tiers
KR4: Achieve average ORC Implementation Rate of ≥65% department-wide

Elite Team Objective: Maximize value extraction from top affiliate relationships

KR1: Grow Tier 1 aggregate GMV by [X]% quarter-over-quarter
KR2: Expand average offers-per-affiliate from [Y] to [Z] across Elite book
KR3: Zero unplanned Elite affiliate churn (retain 100% of Tier 1 affiliates)

Growth Team Objective: Build the pipeline of tomorrow's Elite affiliates

KR1: Progress [N] affiliates from Tier 3 to Tier 2 (based on APS threshold)
KR2: Achieve average TTFPD of ≤18 days for new Growth-tier affiliates
KR3: Deliver ≥2 ORCs per affiliate per month with ≥55% implementation rate

Operations Objective: Build the data infrastructure for signal-based management

KR1: Launch AM dashboard with all 5 core signals live and refreshing every 4 hours
KR2: Achieve 100% CRM adoption (all AM-affiliate interactions logged within 24 hours)
KR3: Produce first network-wide affiliate benchmark report with offer-level performance data

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7. Implementation roadmap

Phase 1: Foundations (Weeks 1–2)

Week 1 — Structure and people:

- Finalize and publish the four-tier segmentation model with current affiliate APS scores
- Assign all existing affiliates to tiers based on historical data
- Draft job descriptions for all roles using the specifications in this report
- Begin recruiting: Head of Commercial (if not already in place), then Team Leads
- Set up CRM system (HubSpot or Salesforce) with affiliate lifecycle stages as pipeline stages

Week 2 — Data and baseline:

- Build the Affiliate Potential Score calculator in a spreadsheet (pre-dashboard)
- Calculate baseline metrics: current total managed GMV, GMV by tier, average TTFPD, current churn rate
- Create the first version of the ORC template (1-page format: diagnosis, recommendation, expected outcome, implementation steps, follow-up date)
- Document the top 10 offers with conversion benchmarks, audience profiles, and top-performing creative angles
- Map existing affiliate communication touchpoints and identify gaps

Critical dependency: Accurate historical affiliate performance data must exist. If data quality is poor, add 1 week for data cleaning and reconciliation.

Phase 2: Systems and training (Weeks 3–4)

Week 3 — Tools and processes:

- Configure CRM with: affiliate records, tier assignments, lifecycle stages, activity logging, alert triggers

- Build v1 AM Dashboard (can be Google Sheets/Looker initially) with the 5 core signals
- Create playbook documents for each lifecycle stage (use the tables in Section 4 as templates)
- Develop the ORC scoring rubric and quality audit process
- Set up communication cadences: daily, weekly, monthly, quarterly meeting templates

Week 4 — Training and dry run:

- Conduct 2-day AM training bootcamp covering: offer portfolio deep-dive, ORC methodology, dashboard interpretation, CRM usage, lifecycle playbooks
- Run simulated ORCs: each AM analyzes 3 real affiliate accounts and delivers practice recommendations, reviewed by Team Lead
- Establish Day 1 quotas using bottom-up affiliate forecasts + 10% stretch
- Soft-launch: each AM begins managing their assigned book with daily Team Lead check-ins for the first week

Critical dependency: CRM and dashboard must be functional (even if basic) before training begins. AMs need to train on real tools, not slides.

Phase 3: Execution and iteration (Months 2–3)

Month 2 — Launch and learn:

- Full execution begins: AMs deliver ORCs per schedule, follow lifecycle playbooks, log all activity
- Weekly: Team Leads conduct ORC quality audits (review 2 ORCs per AM per week)
- Bi-weekly: Head of Commercial reviews dashboard metrics and adjusts tier assignments
- End of Month 2: First monthly department review (90-minute format from Section 5)
- Identify top 3 process failures and fix them immediately

Month 3 — Optimize and scale:

- Analyze Month 2 data: Which ORCs worked? Which offers are converting? Where are affiliates stuck?
- Refine the ORC recommendation library based on what's actually driving results
- Begin automated email sequences for Tier 4 (self-serve) affiliates
- Conduct first quarterly strategic planning session
- Set Q2 OKRs based on Q1 baseline data
- Assess headcount: if AM utilization exceeds 90% of tier capacity, begin recruiting next wave

Risk factors and mitigations

Risk	Probability	Impact	Mitigation
Data quality insufficient for APS scoring	High	High	Start with simplified 3-variable APS (GMV, trajectory, # offers); add variables as data

Risk	Probability	Impact	Mitigation
			improves
AMs default to relationship management over consultative ORCs	High	High	ORC delivery rate as 20% of variable comp; weekly quality audits; public recognition of best ORCs
Top affiliates resist structured AM engagement ("I don't need help")	Medium	Medium	Lead with data they can't get themselves (network benchmarks, offer-level competitive intelligence); frame as partnership, not management
Dashboard development takes longer than 2 weeks	Medium	Medium	Launch with Google Sheets v1; iterate to proper BI tool in Month 3; don't let perfect be the enemy of functional
Affiliate churn spikes during transition to new model	Low	High	Grandfather existing top affiliates' current service levels; introduce structure gradually; assign best AMs to highest-risk accounts during transition

8. Appendix

Glossary of terms

Term	Definition
APS (Affiliate Potential Score)	Composite 0–100 score predicting an affiliate's future GMV potential, based on 6 weighted variables
ORC (Optimization Recommendation Cycle)	The atomic AM action: diagnose → identify highest-leverage change → deliver written recommendation → verify implementation → document outcome
GMV (Gross Merchandise Value)	Total value of sales generated through affiliate traffic before network commission deductions
EPC (Earnings Per Click)	Revenue generated per click sent by an affiliate; primary measure of traffic quality
TTFPD (Time to First Profitable Day)	Calendar days from affiliate onboarding to first day of positive ROI traffic
NRR (Net Revenue Retention)	Percentage of prior-period GMV retained and expanded from the same affiliate cohort
NSM (North Star Metric)	The single metric that, when maximized, ensures both company and affiliate benefit simultaneously
VSL (Video Sales Letter)	Long-form video used on landing pages to sell health supplement offers to end consumers
CAPI (Conversions API)	Server-to-server data sharing mechanism for improved conversion tracking (Meta-specific)
CSM (Client Solutions Manager)	Meta's title for its consultative account management role
GBG (Global Business Group)	Meta's primary sales organization

Term	Definition
LCS (Large Customer Sales)	Google's enterprise advertiser sales division
GCS (Google Customer Solutions)	Google's mid-market and SMB advertiser sales division
AGT (Accelerated Growth Team)	Google's specialized team for high-potential growth advertisers

Dashboard mockup specifications

AM Daily View — Required Components:

Component	Display Type	Data Source	Refresh Rate
Affiliate list with RAG status	Table with color-coded rows (Red/Amber/Green)	CRM + tracking platform	Every 4 hours
Spend trend sparkline	Inline sparkline chart (14-day) per affiliate	Ad platform API or manual import	Daily
Conversion rate vs. 30-day average	Bar chart with reference line	Tracking platform	Every 4 hours
Creative freshness indicator	Days-since-new-creative counter with color coding (Green <14d, Yellow 14–21d, Red >21d)	CRM manual entry or creative tracking tool	Daily
Offer EPC comparison	Affiliate EPC vs. network median EPC, per offer	Tracking platform + network benchmarks	Daily
Engagement status	Days since last interaction, with countdown timer	CRM activity log	Real-time
Pending ORCs	List of due/overdue ORC deliveries	CRM task management	Real-time

Weekly team meeting agenda template (45 minutes)

Time	Item	Owner
0:00–0:05	Network-wide GMV flash (this week vs. last week vs. target)	Team Lead
0:05–0:25	AM round-robin: each AM shares (1) top win with data, (2) top risk with plan, (3) next week's priority ORC — max 4 min each	Each AM
0:25–0:30	New offers / creative intelligence update	Team Lead
0:30–0:40	Deep dive: one affiliate case study (rotating) — what worked, what didn't, lessons	Presenting AM
0:40–0:45	Action items recap and close	Team Lead

Monthly department review agenda template (90 minutes)

Time	Item	Owner
0:00–0:15	Department GMV performance vs. target (by tier, by team)	Head of Commercial
0:15–0:30	Top 10 affiliates deep dive: performance trends, expansion	Elite Team Lead

Time	Item	Owner
	opportunities	
0:30–0:45	Bottom 10 affiliates + churned accounts: root cause analysis, preventability	Growth Team Lead
0:45–1:00	ORC quality audit results: 5 sampled ORCs reviewed, scoring discussion	Ops Manager
1:00–1:15	New affiliate pipeline + activation metrics	Developing Team Lead
1:15–1:30	3 actions for next month + open discussion	Head of Commercial

AM scorecard template (monthly)

Metric	Target	Actual	Status	Trend
Book GMV	$[X]		◯	↑↓→
GMV vs. Quota	100%		◯	↑↓→
ORC Delivery Rate	[X]/affiliate		◯	↑↓→
ORC Implementation Rate	≥60%		◯	↑↓→
ORC Hit Rate	≥50%		◯	↑↓→
TTFPD (new affiliates)	≤[X] days		◯	↑↓→
Affiliate Churn Rate	<5%		◯	↑↓→
Stage Progressions	[X]		◯	↑↓→
CRM Completeness	100%		◯	↑↓→

Source classification for all claims in this report

Primary sources (directly from Meta or Google):

- Meta Careers blog: organizational structure, role descriptions
- Meta Opportunity Score: Ads Manager documentation, Blueprint course
- Meta engineering blog: Andromeda system, Advantage+ architecture
- Google Ads Help Center: Optimization Score, Recommendations, Customer Lifecycle Goals
- Google Developers documentation: RecommendationService API
- Google re:Work: OKR framework methodology
- Google Research: Advertiser churn prediction paper (Yoon et al., 2010)
- Google Business: KPI framework (See-Think-Do-Care), expert onboarding

High-quality secondary sources (former employees, industry research firms):

- Rick Kelley (ex-Meta SVP, 15 years): headcount methodology, segmentation approach — via GTM Podcast

- Jyll Saskin Gales (ex-Google LCS, 2015–2021): Google sales org structure, LCS vs. GCS, role hierarchy
- Alexander Group: AM sizing methodologies, media sales motions, headcount planning frameworks
- Optmyzr: Independent study of 17,380 Google Ads accounts and Optimization Score performance
- Haus: 640 incrementality tests on Meta Advantage+ performance
- RepVue: Self-reported compensation data for Meta and Google AM roles

Industry inference (labeled as such in text):

- Meta's internal North Star Metric for its sales organization (not publicly confirmed)
- Exact AM-to-account ratios at Meta and Google (estimated from industry benchmarks)
- Google's internal predictive scoring model for account segmentation (described as composite but specifics proprietary)
- Internal AM dashboard architectures at both companies (inferred from job descriptions and customer-facing tools)